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DYNAMICS CON LIVE

MAY 2024

The Keys to Marketing Across Generations in 2024





Kate Coffey
VP, Marketing
US Transactions Corp



Sam Bush
Sr. Partner Marketing Manager
FloQast



Mary Miller
Director, Marketing
PayTrace



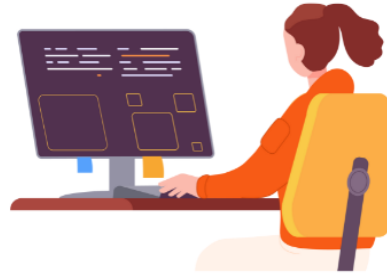
Understanding the Generations



Baby Boomers
(1946 – 1964)
Age 60-78 in 2024

Value loyalty, patriotism and quality.
Prefer traditional marketing, i.e. TV
and print media.

This generation has a high level of
discipline, mentally tough, strong
principles, remains loyal & dedicated.



Gen X
(1965 – 1980)
Age 44-59 in 2024

Skeptical and value work-life balance.
Respond well to email and social media
marketing.

Generation X is disciplined, hard-
working, resourceful, logical
& independent.



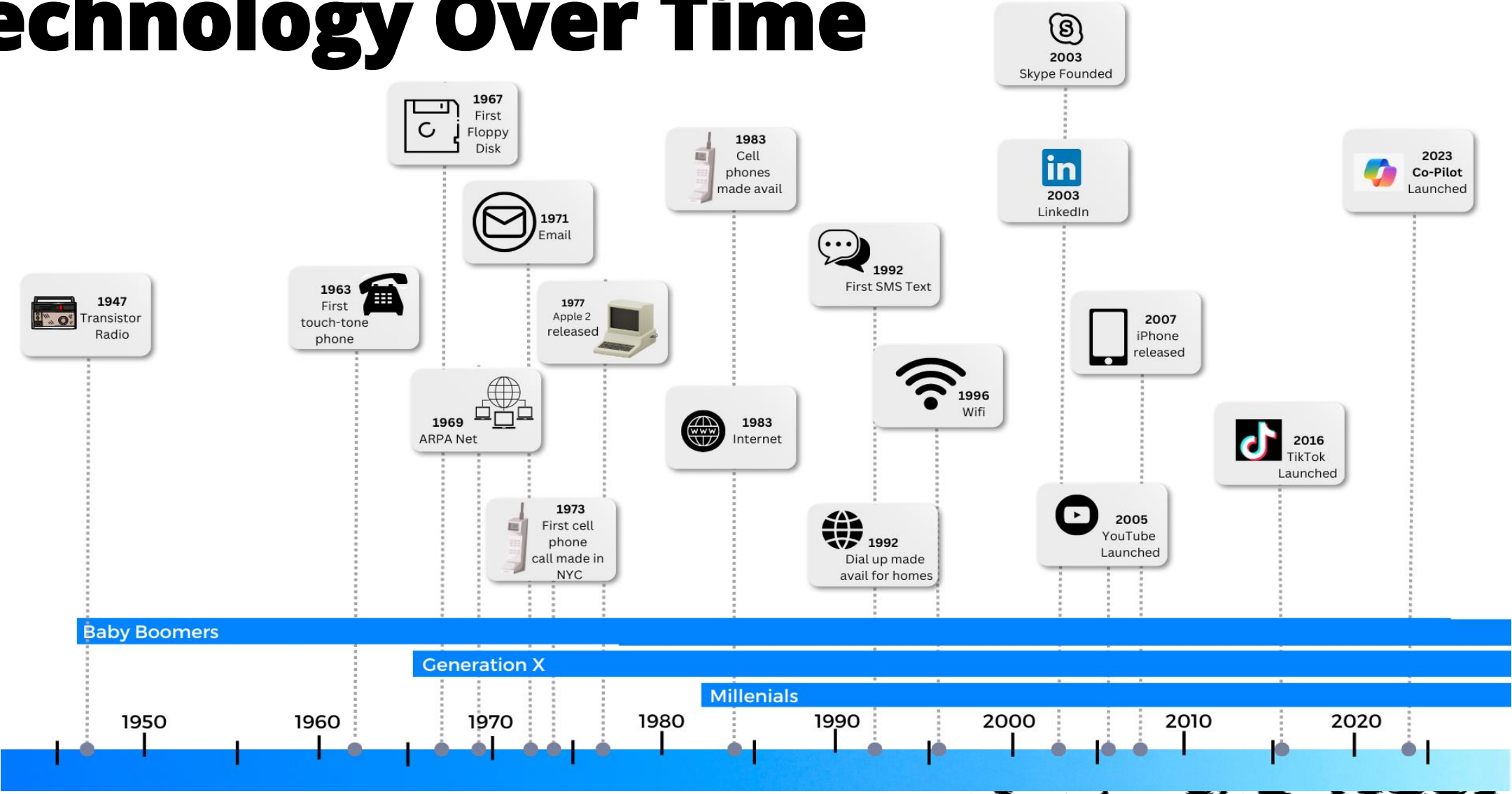
Gen Y or Millennials
(1981 – 1996)
Age 28-43 in 2024

Prioritize experiences, authenticity and
social responsibility.
Favor mobile, social media and
influencer-based marketing.

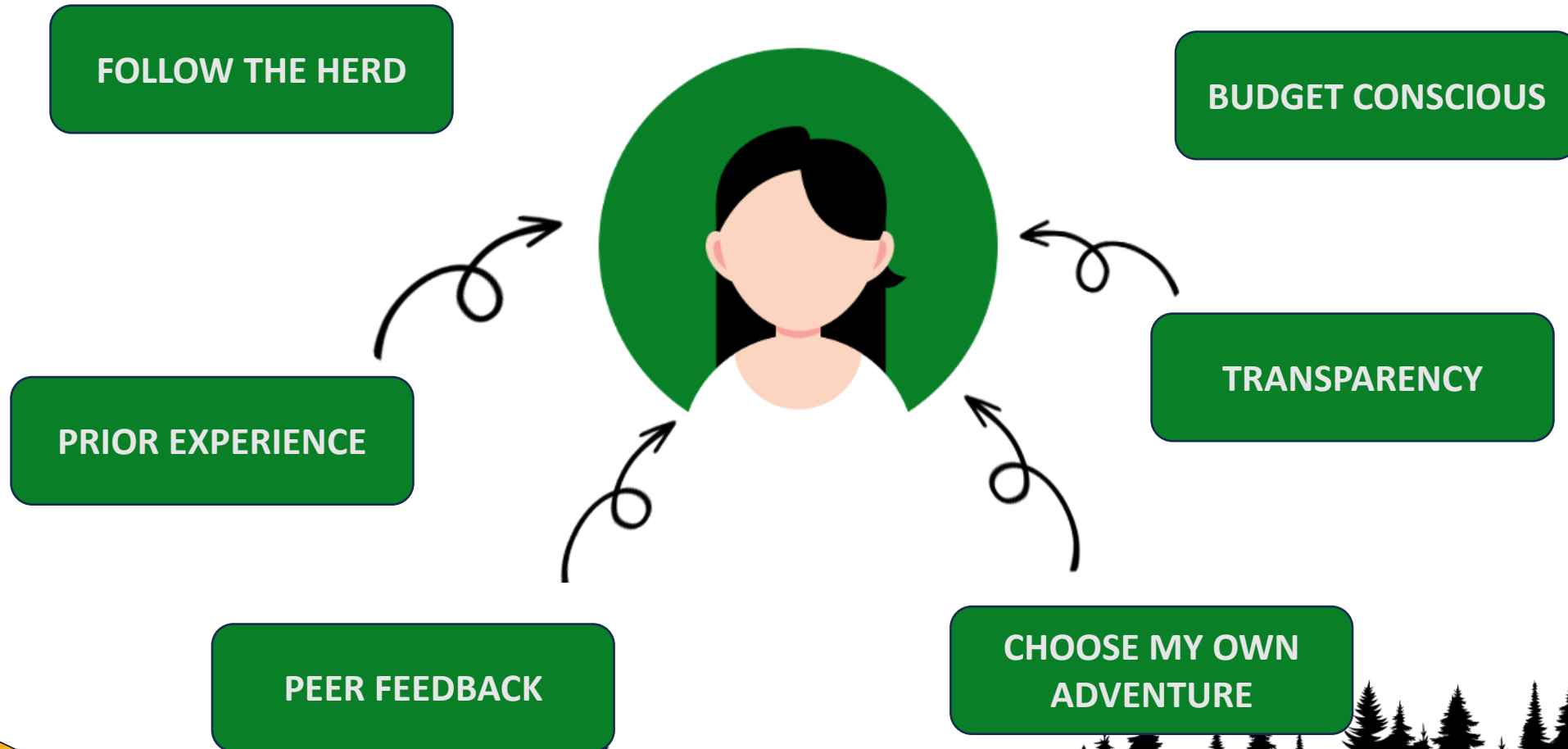
Millennials tend to be bolder in their
opinions, have high self-confidence and
think outside the box.



Technology Over Time



The Human Psychology



The Human Psychology

- **71%** of consumers prefer self-service tools over speaking to a human when doing research on a B2B software or solution.
 - *(Up almost 20% since pre-covid buying)*
- Only **29%** of consumers prefer to speak to a human when researching a product

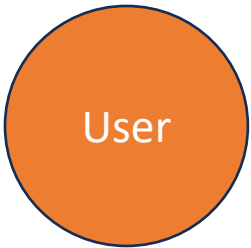


B2B Buying Disconnect: The Self-Serve Economy Is Prove It or Lose It

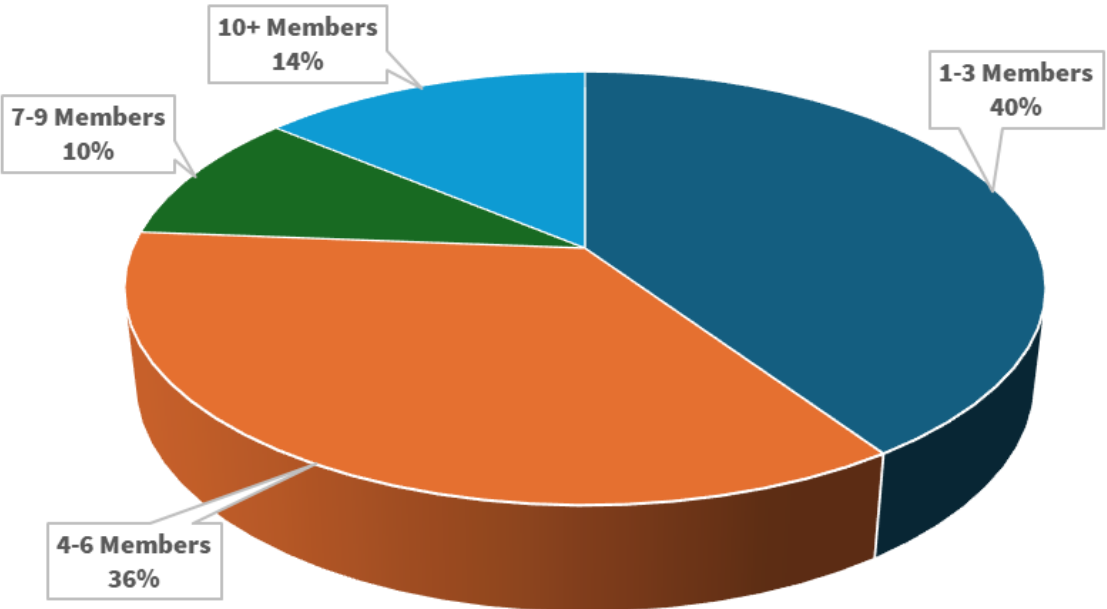


The Evolution of Your Buying Committees

BEFORE



Current Buying Committee Makeup



Most Preferred Way To Consume Content (B2B)

Boomers

- Blogs
- eBooks
- Reviews
- Social Media
- Video
- Customer Stories

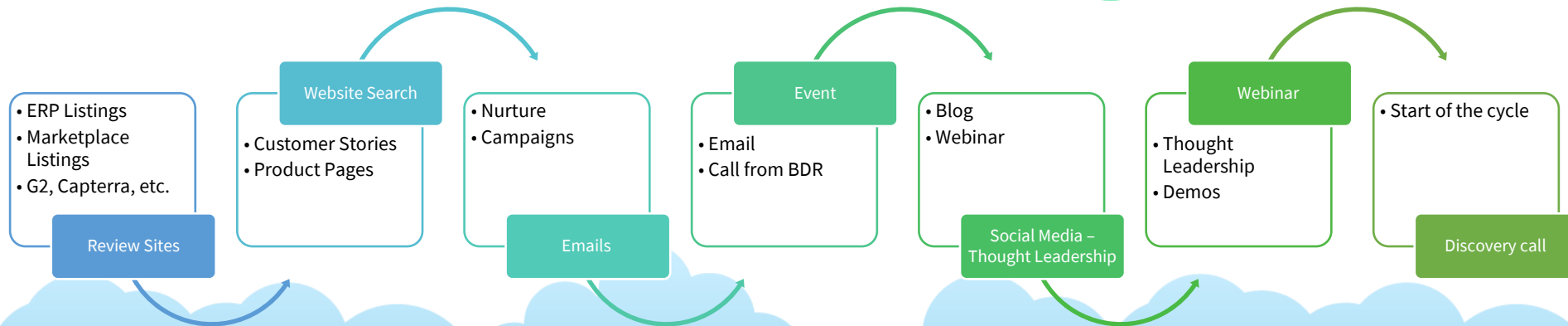
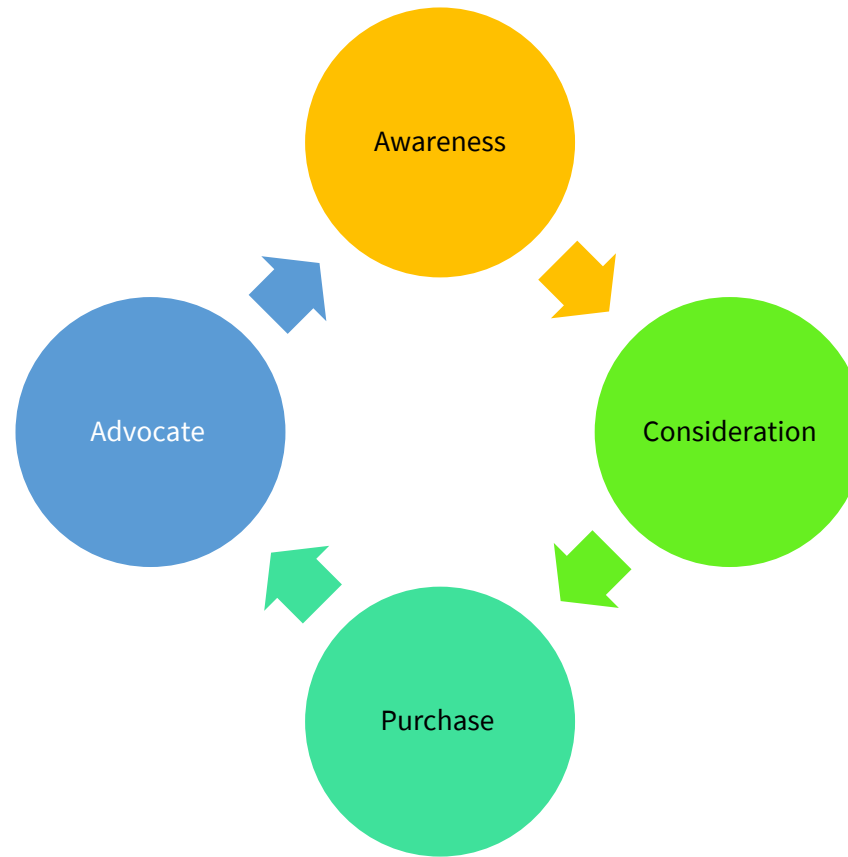
Gen X

- Email
- Social Media
- Video
- Blogs
- eBooks
- Customer Stories

Millennials

- Video
- Reviews/Customer Stories
- Webinar
- Templates
- Blogs

Previous Buyers' Journey



Your "COMING SOON" Buyer's Journey

Seller free experiences in B2B?



GP User Profile

“Mail Order” Perspective

- Keyboard over mouse
- Comfortable and reliable
- It just works (and if it ain't broke...)
- Facebook / Blog marketing profile
- LinkedIn and YouTube for all

Payables Transaction Entry - TWO (sa2)

Save Delete Post AA Options File Print Print Tools Help Add Note

Voucher No. 0000000000000463 Intercompany Batch ID
Document Type: Invoice Doc. Date 4/12/2027
Description short description goes here
Long Description Your Long description goes here. This new feature will allow you to enter up to 200 characters a

Vendor ID ACETRAVE0001 Currency ID Z-US\$
Name A Travel Company Document Number
Address ID PRIMARY P.O. Number
Remit-To ID REMIT TO Shipping Method OVERNIGHT
Payment Terms Net 30 Tax Schedule ID COMPANYPUR

Purchases	\$2,020.20	1099 Amount	\$0.00
Trade Discount	\$0.00	Cash	\$0.00
Freight	\$0.00	Check	\$0.00
Miscellaneous	\$0.00	Credit Card	\$0.00
Tax	\$0.00	Terms Disc Taken	\$0.00
Total	\$2,020.20	On Account	\$2,020.20

Apply Distributions Print Check

by Batch ID Status Unsaved

GP User Approach to Change

Resistant to Change (But we're getting there)

- Fewer college students earning accounting degrees
- Accounting and finance professionals who started with GP are training the next generations
- Gen Xers and Boomers are living and working longer, started earlier and like to work
- All generations prefer their computer as their primary device
 - Boomers prefer tablets as their next choice
 - Gen Xers and Millennials prefer mobile devices
 - More than 115% more Millennials use mobile devices compared to Boomers



BC User Profile

“DoorDash” Perspective

- Cloud-based, instant access
- Flexible and mobile
- Always pushing the limits, wanting more
- TikTok marketing profile
- YouTube & LinkedIn applies to both
 - 1 Billion hours of YouTube content consumed every day
 - 60% of LinkedIn users are in the age range of 25-34

The screenshot displays the 'Customer Card' for '10000 · Adatum Corporation' in Microsoft Dynamics 365 Business Central. The interface includes a navigation bar with options like 'Process', 'Request Approval', 'New Document', 'Prices & Discounts', 'Customer', 'PayTrace', and 'Report'. Below this, there are tabs for 'Customer Credit Card', 'Create Authorizations and Payments', and 'View Payment History'. The main content area is divided into several sections: 'Financials' (showing Credit Limit, Balance, and Total Sales), 'Address & Contact' (with fields for address, phone, and email), and 'Customer Picture' (with a profile photo). A 'Pay Trace Authorizations' section shows a count of 1 authorization. The bottom right corner displays the 'Customer No.' as 10000.



BC User Approach to Change

Time for Change

- In the next 2 years, 64% of business buyers will be Millennials and Gen Z
- Younger buyers have new demands, higher expectations for B2B buying
- 90% of Millennials will express dissatisfaction with a vendor, compared to 71% of older generations
- Let them! And make it easy to do!



5 Keys To Marketing Across Generations

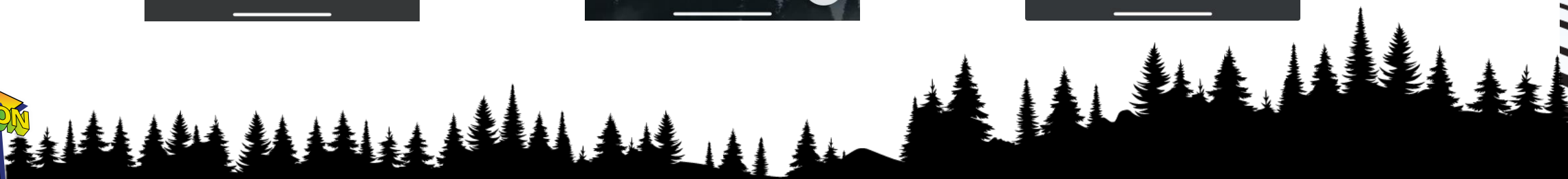
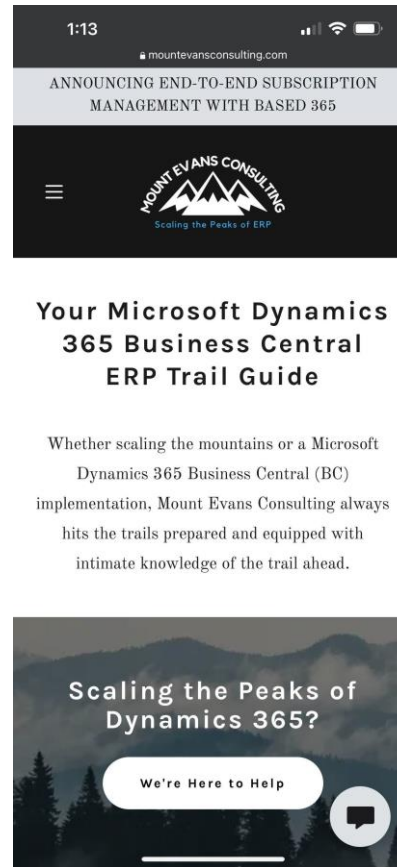
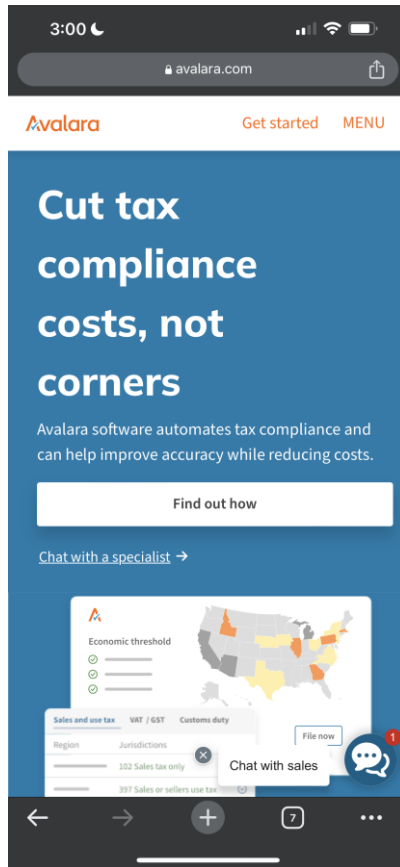
- 1) Mobile First
- 2) Rely On Video
- 3) Social Proof
- 4) Personalized Journey Experiences
- 5) AI-Driven Content and Data



New
Tip!



1 – Mobile First



2 – Rely on Video

Polished video is your best way to hit all your audiences.

Baby Boomers: 1 in 3 scroll YouTube to learn about products

Generation X: love nostalgic leaning video content

Millennials: prefer raw, authentic video that is short form

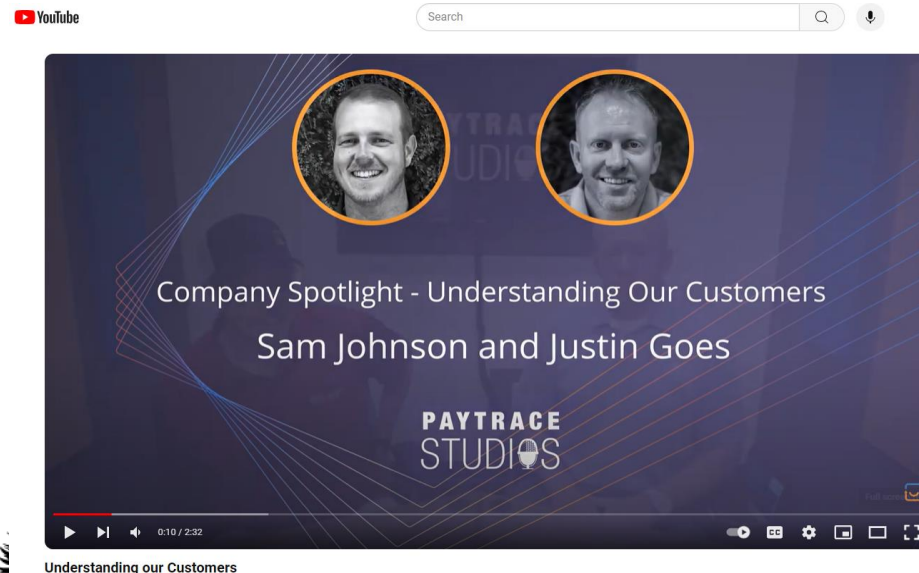


Download Case Study PDF

ly implemented a fraction of the daily allocated to s.

Improved transparency for leadership and team members across the organization.

Reduced time spent on information requests by 70%. Cut time spent on reconciliations by five-to-six hours per month.



#FloQast 17,115 followers 4d · 🌐

Don't sweat your recs! 😓 Manage and automate your reconciliation process with the new, AI-powered FloQast Reconciliation Management. ...see more

More than 70% of Accounting Teams are stuck in the manual grind



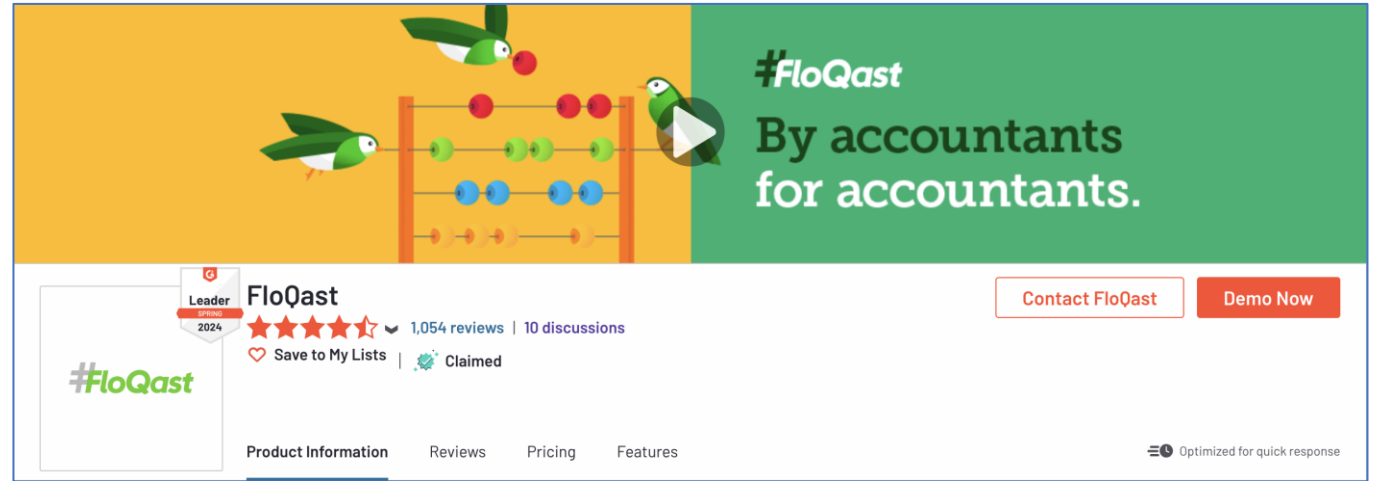
3 – Social Proof

Remember how the human psychic works. We crave to be like the herd underneath it all.

We are looking for peers who have had success the make the move to something new, easier.

Using customer quotes and stories throughout your website, email strategy, social media, and more will help your self-service audiences.

Tip on how to get these: activate your internal teams to help!



#FloQast
By accountants
for accountants.

Leader
Spring
2024

FloQast
★★★★★
1,054 reviews | 10 discussions
Save to My Lists | Claimed

#FloQast

Contact FloQast Demo Now

Product Information Reviews Pricing Features

Optimized for quick response



"FloQast offers wonderful visibility for us, even with everyone shifting to remote locations... it's made us more efficient, and it's made managing the Close so much easier. It's a fantastic tool; we love it."

Jeanne Du
Head of General Ledger

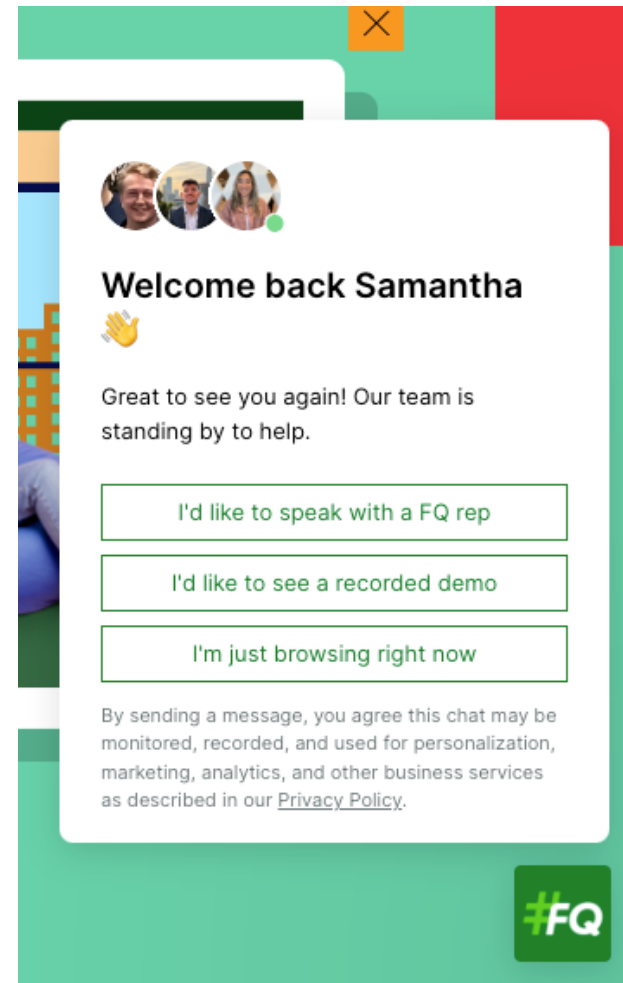
zoom [Read the Case Study](#)



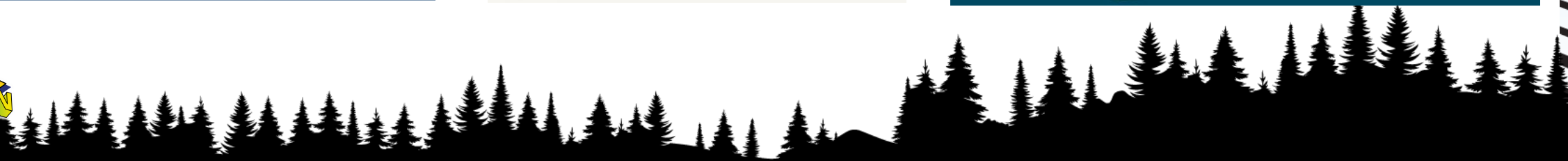
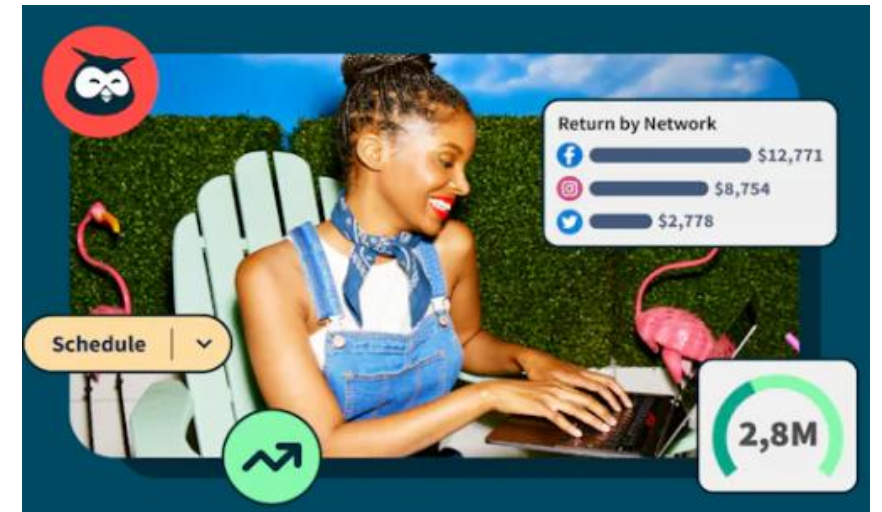
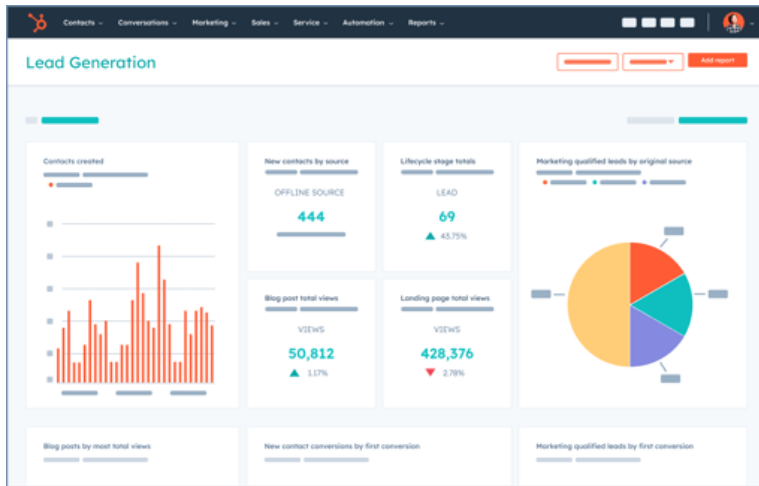
4 – Personalized Journey Experiences

Incorporate your buyer's name (if you can) in more than just your email sends.

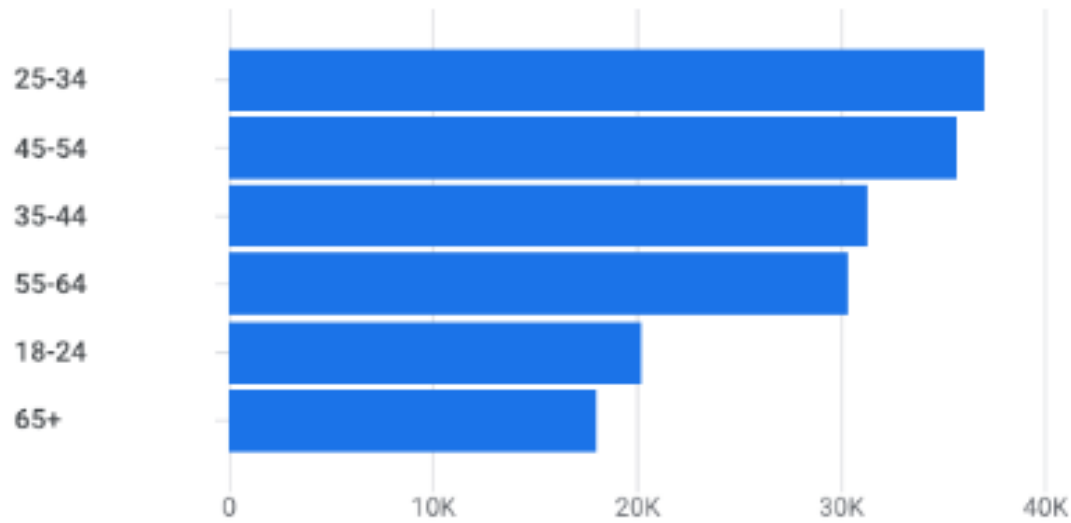
Think outside of the box and use your data to enhance their experiences.



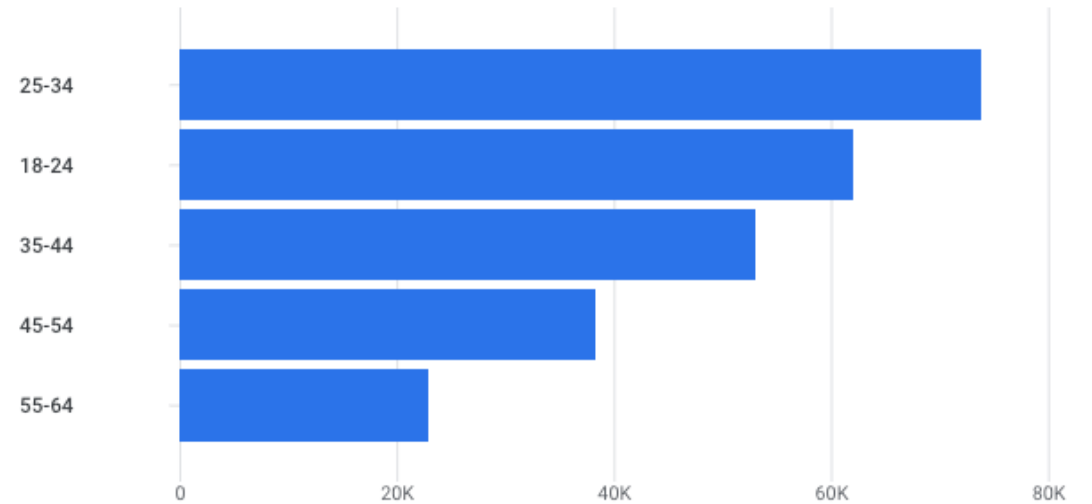
5 – AI Driven Content & Tools (Save Time!)



Real-world Data: Website Visitors by Age



 PayTrace



 #FloQast



Real-world Data: LinkedIn Users by Seniority

Visitor demographics ⓘ

Seniority ▾

Senior · 420 (25.5%)

Entry · 312 (18.9%)

Director · 210 (12.8%)

CXO · 171 (10.4%)

VP · 115 (7%)

Manager · 109 (6.6%)

Owner · 60 (3.6%)

Partner · 46 (2.8%)

Training · 18 (1.1%)

Unpaid · 2 (< 1%)



Visitor demographics ⓘ

Seniority ▾

Senior · 7,240 (33.9%)

Entry · 4,856 (22.7%)

Director · 2,044 (9.6%)

Manager · 1,219 (5.7%)

VP · 939 (4.4%)

CXO · 824 (3.9%)

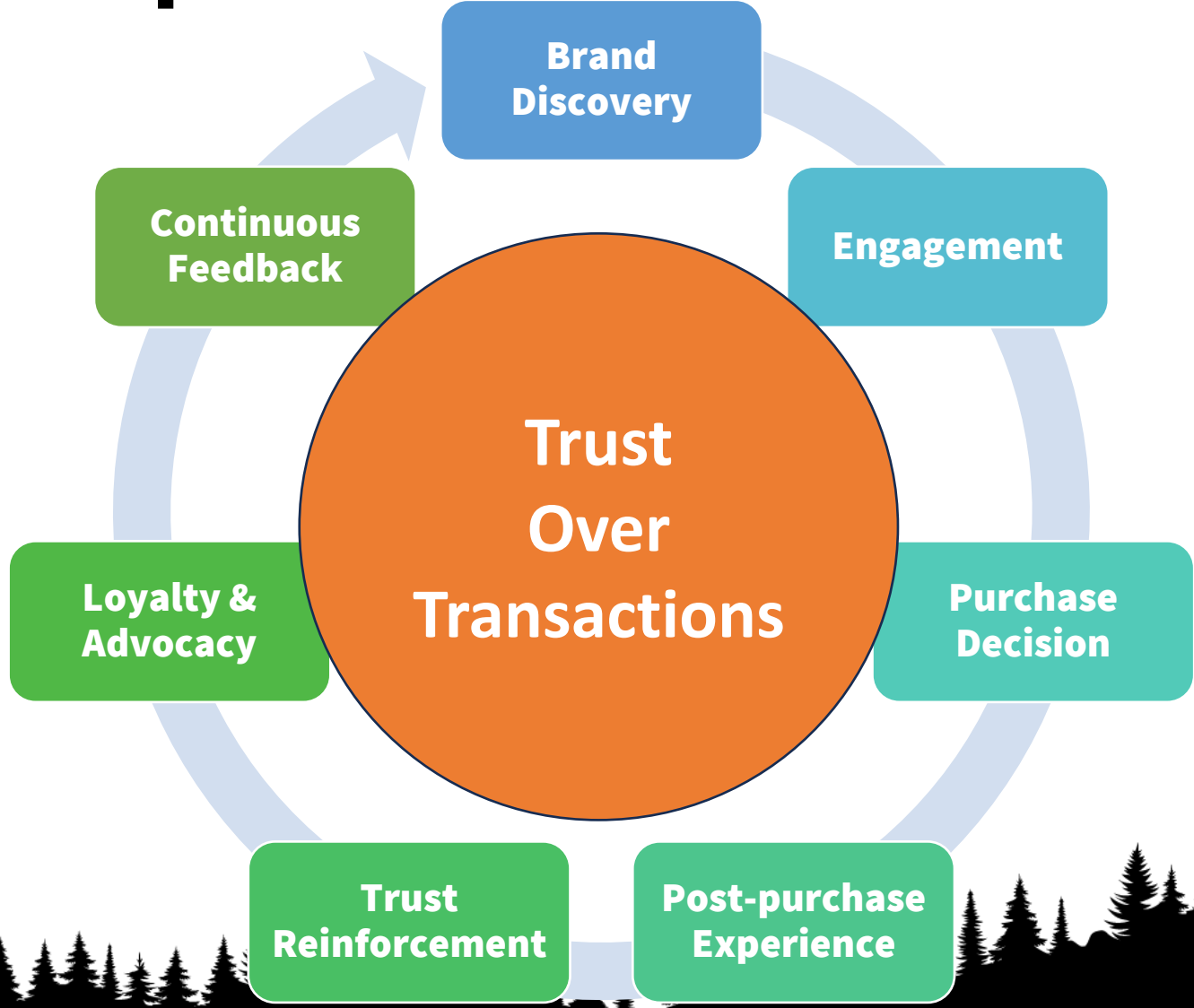
Owner · 570 (2.7%)

Partner · 271 (1.3%)

Training · 141 (< 1%)



The Trust Loop – Screenshot this!



5 Keys To Marketing Across Generations

- 1) Mobile First
- 2) Rely On Video
- 3) Social Proof
- 4) Personalized Journey Experiences
- 5) AI-Driven Content and Data



Good afternoon John,

Thank you for coming to our session on "Marketing Across Generations in 2024." Your energy and involvement made the event not just a success, but also fun!

In the session, we dove into the dynamics of marketing strategies that reach 3 different generations; Baby Boomers, Generation X, and Millennials. We understand that reaching 3 different generations with your marketing message can be overwhelming. We hope we showed you some useful tools and tricks that you can use.

Here's a quick summary of what we talked about:

1. **Mobile First:** We talked about how important it is to make sure your marketing works well on mobile phones. Everyone's using them, so it's key to reach all generations.
2. **Rely on Video:** We highlighted how powerful videos are for getting people's attention and getting messages across quickly. Whether it's touching stories for Boomers, practical tutorials for Gen X, or quick, shareable stuff for Millennials, videos are super versatile.
3. **Social Proof:** We discussed how testimonials, reviews, and content created by users can build trust and credibility. Hearing from others helps everyone feel more confident about their decisions.
4. **Personalized Journey Experiences:** We looked at creating personalized journey experiences to offer unique, individualized messaging to engage with your customer and build trust.
5. **AI-Driven Content and Data:** Lastly, we talked about how AI can help personalize the customer experience and use data to improve our marketing. We offered several tools you can use to help in your marketing strategy.

— “ —

*Fantastic delivery of
very useful and
insightful
information.*

— ” —



We can't wait to hear stories of how you implemented these ideas.

If you want to dive in deeper with us, join us in the upcoming Channel Marketing Academy workshop on June 26, 2024.

You can find out more information by scanning the QR code



Questions & Discussion

Take a deeper dive in the upcoming
Channel Marketing Academy workshop
June 26, 2024





Thank You!



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